

The World's Food & Beverage Companies Top 100 - 2013

Food Intelligence has just published its strategic world survey carried out starting from the Food Intelligence global database 'WFC 1000' (World Food Companies 1000). This study includes both a strategic presentation & analysis of the 100 major food companies of the world and a ranking that gives for each firm its global net sales and its food net sales.

July 31, 2013 (FPRC) -- Food Intelligence has just published its strategic world survey carried out starting from the Food Intelligence global database 'WFC 1000' (World Food Companies 1000). This study includes both a strategic presentation & analysis of the 100 major food companies of the world and a ranking that gives for each firm its global net sales and its food net sales.

The rank awarded to the company is a function of food net sales exclusively. Net sales are expressed in € million (millions of Euros). The figures are those of the last closed fiscal year (ending in 2012 or in 2013) published by the companies (very exceptionally estimated by Food Intelligence). Net sales are converted in Euros (€ millions) on a 2012 full year average exchange rates basis.

Top 100 profile:

Total Food Net Sales ≈ 1391 € billion in 2013 (1056 billion in 2010, 840 in 2008 !).

17 new incoming companies in 2013 Top 100 compared to previous 2010 Top 100

35 companies are based in Europe, 27 in Northern America, 18 in Japan. China has now 8 companies.

31 « Brands » companies (final consumer oriented with global brands portfolio) like NESTLÉ or PEPSICO

47 « Mixed » companies (value-added branded and basic products...), like JBS, TYSON, LACTALIS or FONTERRA, including four Japanese sōgō shōsha and Chinese and Korean conglomerates.

23 « Commodities » companies (agribusiness &/or trading &/or ingredients), including global trading companies (like CARGILL, ADM, BUNGE, LDC, WILMAR or CHS), ingredients specialists like SÜDZUCKER or KERRY, traditional agribusiness cooperatives like AGRAVIS, LDG or TERRENA, etc.

57 'Specialized', 21 'Diversified', 22 'ATI' (Agribusiness, Trading or Ingredients) firms.

63 are listed.

Some Major Strategic Findings:

- One of the most important lessons, among many others highlighted by this study, is the considerable increase in the weight of players having a commodity trading/agribusiness activity compared to pure branded products manufacturers.

- Since 2008 the weight of 'Diversified' companies stagnate while 'Agrindients' (Agribusiness or Trading, or Ingredients groups), 'Beverage' and 'Dairy' companies are strongly increasing their share in this Top 100.

- Another conclusion is the obvious decline in the number and relative size of firms based in North America, although for now the U.S. still have eight giants (CARGILL, ADM, PEPSICO, COCA-COLA, MONDELEZ, TYSON, CHS and MARS) among the top 20 global agribusiness. This feature is linked to the following finding (cf. internationalization) and reflects the inertia of U.S. firms asleep for too long on a relatively protected domestic giant and growing market.

- Internationalization: at the beginning of the 21st century the region of origin of a firm remains essential, particularly for Japanese or US food companies. The average rate of internationalization (ORO rate) of top 100 food firms is relatively low (36% of sales are generated outside the region of origin). Only 29 firms have an ORO higher or equal to (50%). For more information see our work «GLOBALIZATION OF WORLD FOOD COMPANIES - WFC INTERNATIONALIZATION RANKING – 2013 ».

Methodology (extract):

...The 'food and beverages' products sphere adopted by Food Intelligence rests in fact on a widened meaning of the 'agri-food' term. This universe includes all the activities taking their source in agriculture, fishing or aquaculture, whatever are the final stage (processed or not...) and the final use of the foodstuff - food/feed or not (bio-energy, materials, molecules...) - given that 'traditional' non-food (e.g.: 'conventional' textile like cotton, decorative horticulture...) - except as a minority and dependent activity - should be excluded, if possible. For 'ethical' reasons tobacco industry has been excluded... The universe includes the 'internal' inputs of the end products (e.g.: raw materials of course, but also seeds, animal selection & breeding or animal nutrition, ingredients, etc...). It can also include, but only as a minority or dependent activity, products having a simple role of 'maintenance', protection, improvement or growth of the plants or animals (e.g.: fertilizers, plant health, animal health...). But it does not include, in theory, the 'external' inputs of the end products (in particular: packaging, tools, production or transformation equipment, agricultural machinery...). Non-renewable energy and renewable energy having a non-agricultural origin are excluded. The 'food' universe not only includes physical 'products' but can also include 'services', in particular those intended for the farmers... Food Intelligence only take into account the companies carrying out at least 50% of their activity (in terms of sales) in the agri-food industry (in the broad sense, as indicated above) except if this activity, even minority, is clearly identifiable (preferably in a specific structure...) and, above all, clearly considered as a strategic business / segment for these groups. For this reason groups whose distribution / logistic (e.g.: food retailing) or foodservice activities are in a majority in their total sales are normally excluded, except when food manufacturing activities are clearly identifiable (as explained above), managed as a whole independent entity and...measurable! A contrario, when these activities are in the minority they can be integrated with food businesses in the perimeter of 'food' net sales...

Of course, beyond the widened vision to which Food Intelligence has given priority, the extent to which such or such group has been taken into account in this ranking is more a question of 'bon sens' than a question of theoretical definitions or even of common criteria and segmentations people are accustomed to use or think with.

*: Price € 289

Links:

- general: <http://www.foodintelligence.fr>
- buy: <http://www.foodintelligence.fr/#!/world-top-100/vstc7=page-2>
- preview: <http://fr.slideshare.net/sergeguegan/worldfoodcompaniestop1002013foodintelligence>

Contact Information

For more information contact Serge Guégan of Food Intelligence (<http://www.foodintelligence.fr>)

Keywords

[food](#)
[companies](#)
[100](#)

You can read this press release online [here](#)